

# STRATEGIC GIVING NOW AND FOR THE FUTURE



## FREE WORKSHOP

May 7, 2022  
The Bayside Oceanfront Resort (*Tidal Ballroom*)  
240 Dogwood St Parksville  
Registration: 9:30 a.m.  
Presentation: 10 a.m. – 11:30 a.m.  
Q & A – 11:30 a.m. – 12:00 noon  
Complimentary refreshments and giveaways

HOSTED BY:



**SOS LEGACY  
STEWARDS**  
Honouring your past. Stewarding our future.

Connect, engage, and learn how you can make a lasting difference

### About the workshop

This event is intended for people who want to learn ways their estate planning can help save money on taxes while at the same time invest in the good works of charities you care about.

### You will learn:

- The state of charitable giving in Canada
- How to donate assets other than cash
- Donor advised funds
- Tax aspects of deferred gifts
- Real world stories
- How to create your own giving plan

### About our Presenter

Glory Gray, BSc finance, MFA philanthropy, started in the financial industry in 1988 as an analyst in investment banking and began helping others build wealth in 2001. She is a past member of the Canadian Association of Gift Planners.

### REGISTRATION REQUIRED

To save your seat for this free event, register online at: <https://strategicgiving.eventbrite.ca> or call SOS at (250) 248-2093

Seating limited so don't delay.  
Cancellation required by May 5.

*COVID protocols required by Bayside at the time of the event will be in effect.*

A FREE PERSONAL  
INFORMATION REGISTRY  
BOOKLET WILL BE GIVEN TO  
ALL ATTENDEES.

## OUR THANKS...

### Event Sponsor

BONNIE CYRE  
**RAYMOND JAMES**  
QUALICUM BEACH BRANCH

### Speaker & Panelists

Presenter: Glory Gray Wealth Solutions  
Panelists: Bonnie Wallis (CGA) & Co.  
and Jennifer Hubbard - All Points Law



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